

## PRIOR ART

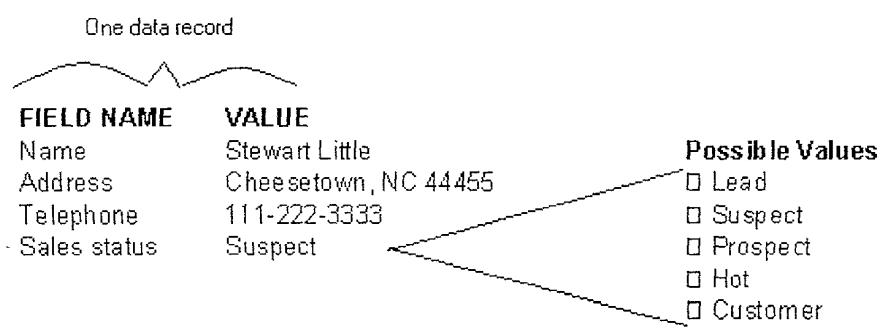


FIGURE 1

PRIOR ART

Name	Source of lead	Enjoys Sports	Enjoys Ballet	Smokes Cigars	Sales Cycle Status
Alice	Web	Yes	Yes	Yes	Suspect
Bobby	Call in	No	No	No	Lead
Joe	Direct Mail	Yes	No	No	Suspect
John	Web	No	Yes	Yes	Prospect
Mark	Direct Mail	No	No	Yes	Lead
Mary	Call in	Yes	No	Yes	Lead
Michael	Call in	No	Yes	No	Lead
Paul	Web	Yes	No	No	Lead
Peter	Web	No	Yes	Yes	Prospect
Raymond	Direct Mail	Yes	Yes	No	Hot Prospect
Rodney	Web	Yes	No	Yes	Lead
Samantha	Call in	Yes	No	No	Prospect
Sylvia	Call in	Yes	No	No	Suspect
Tracy	Web	No	Yes	No	Hot Prospect
Trent	Web	No	No	No	Suspect

FIGURE 2

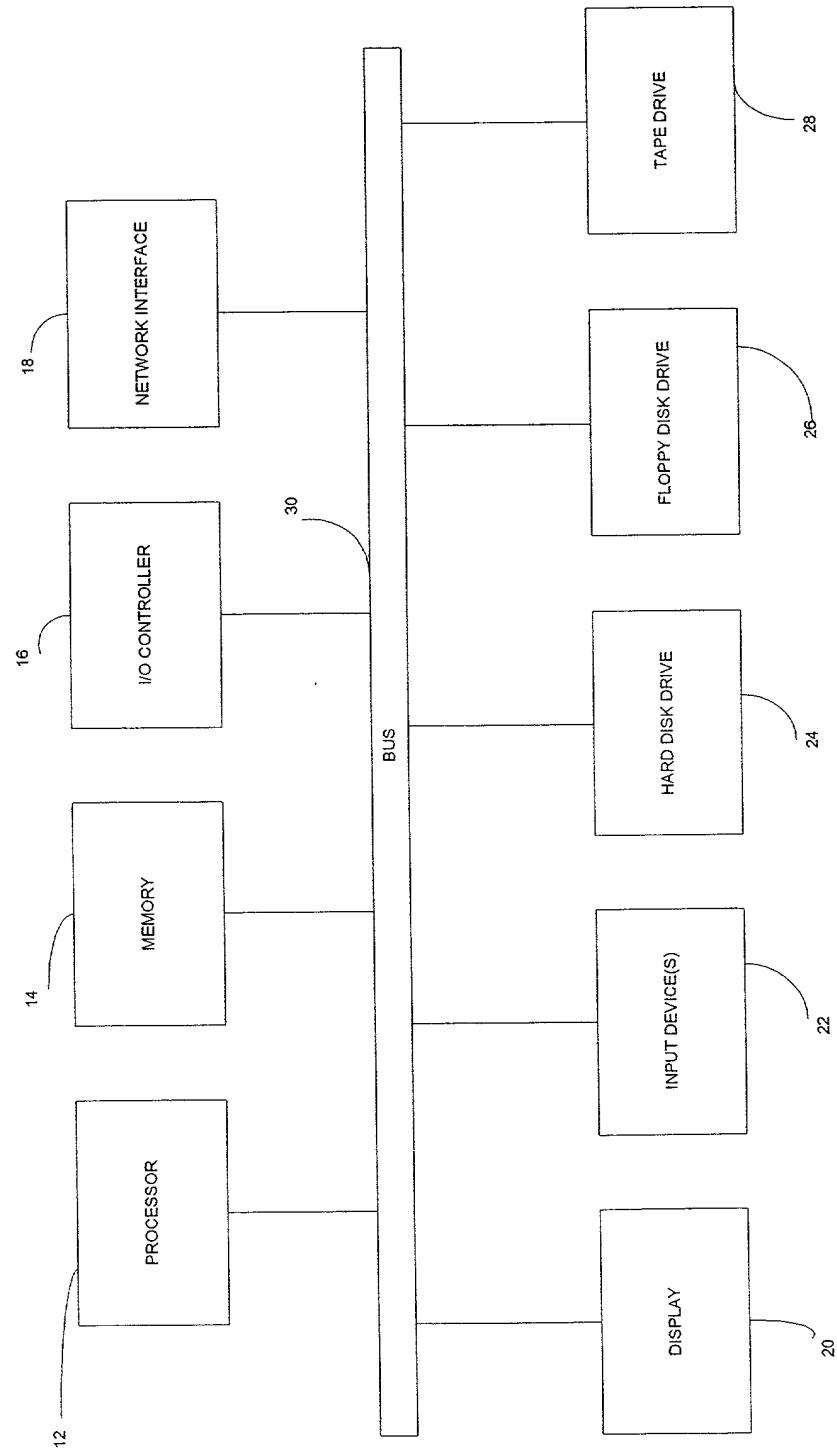


FIGURE 3

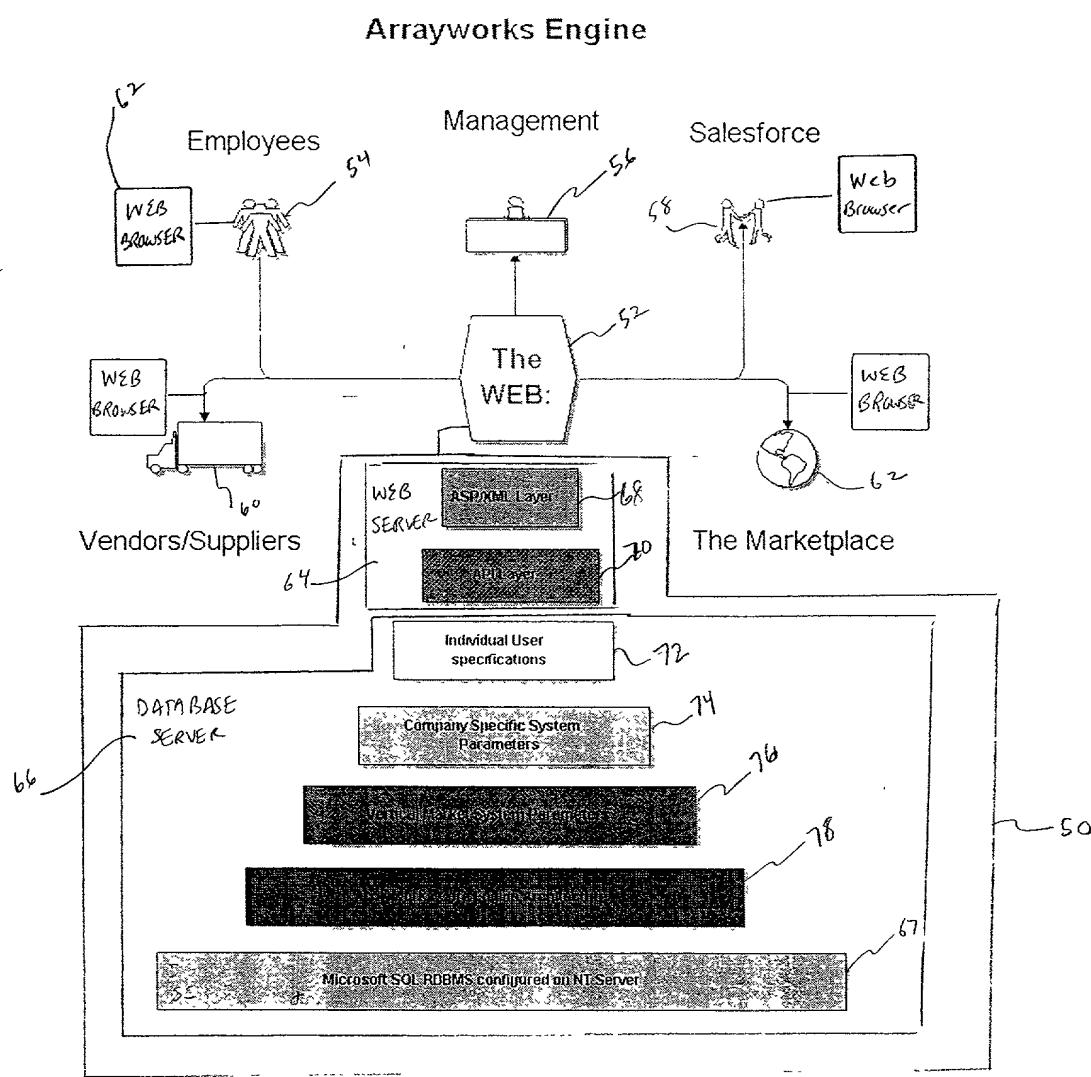


FIGURE 4.

## Overview

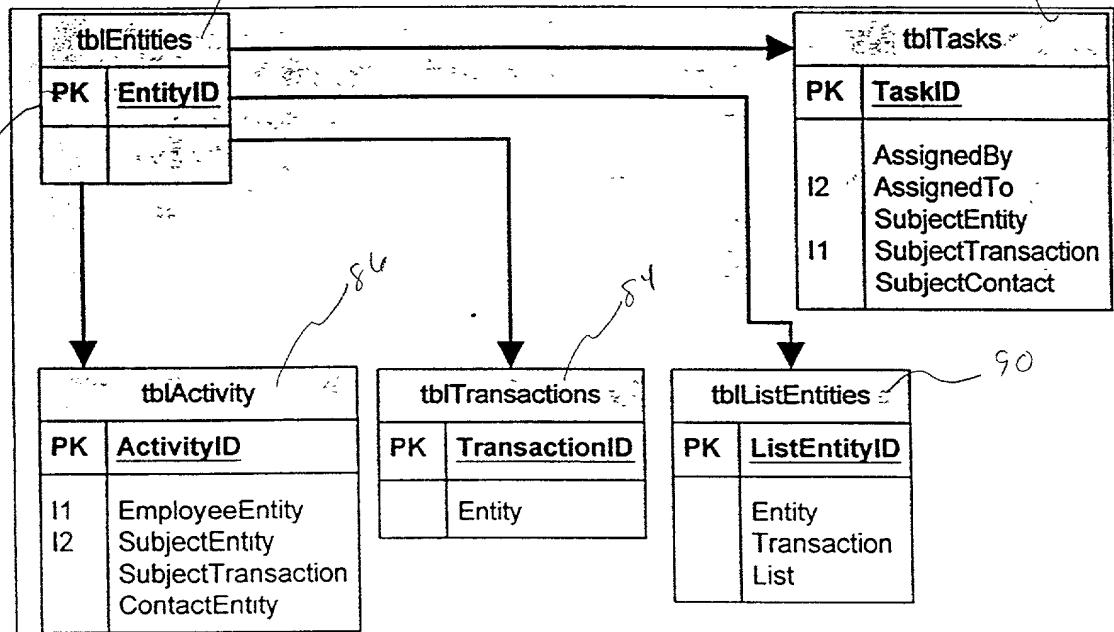


FIGURE 5

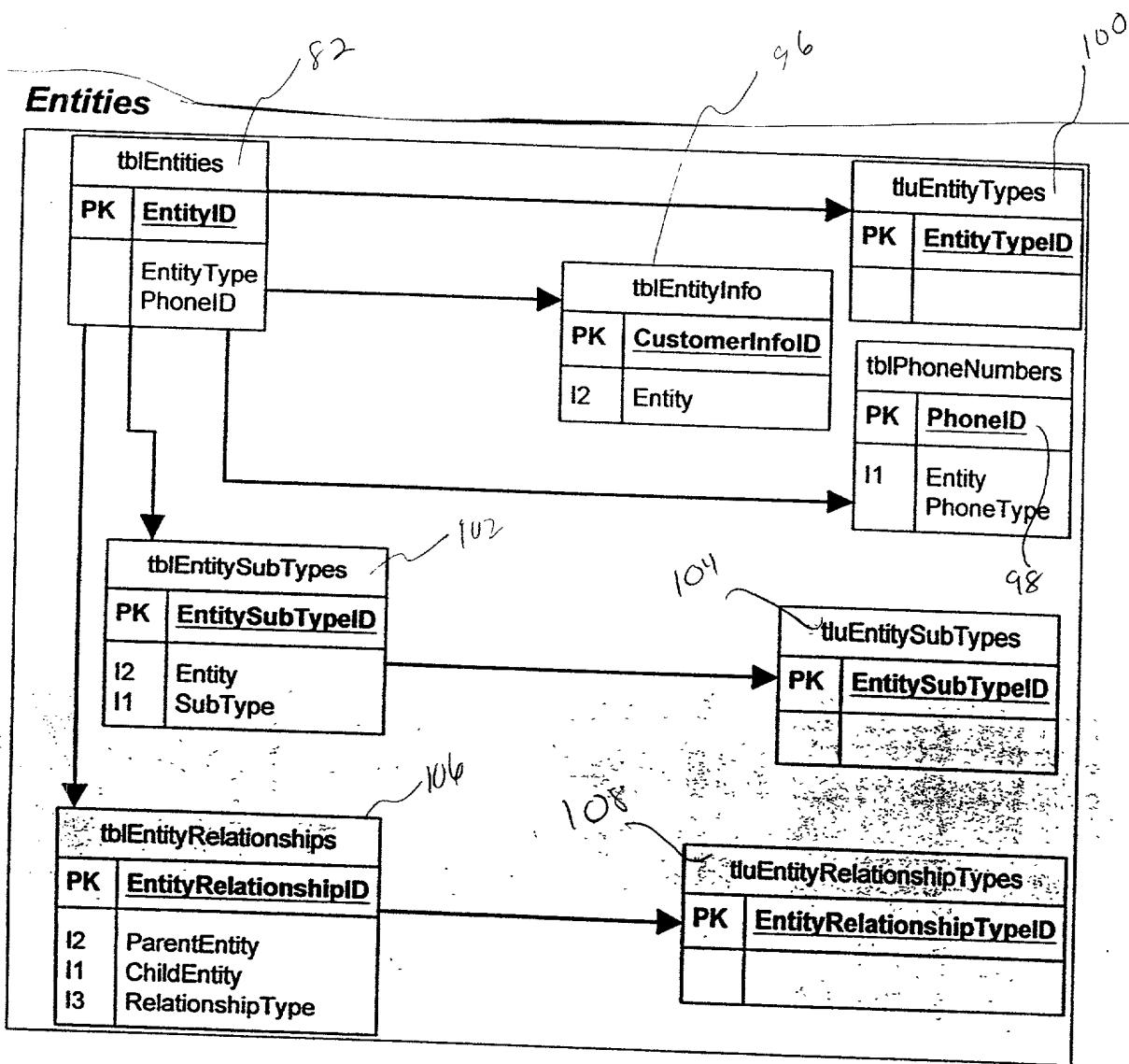


FIGURE 6

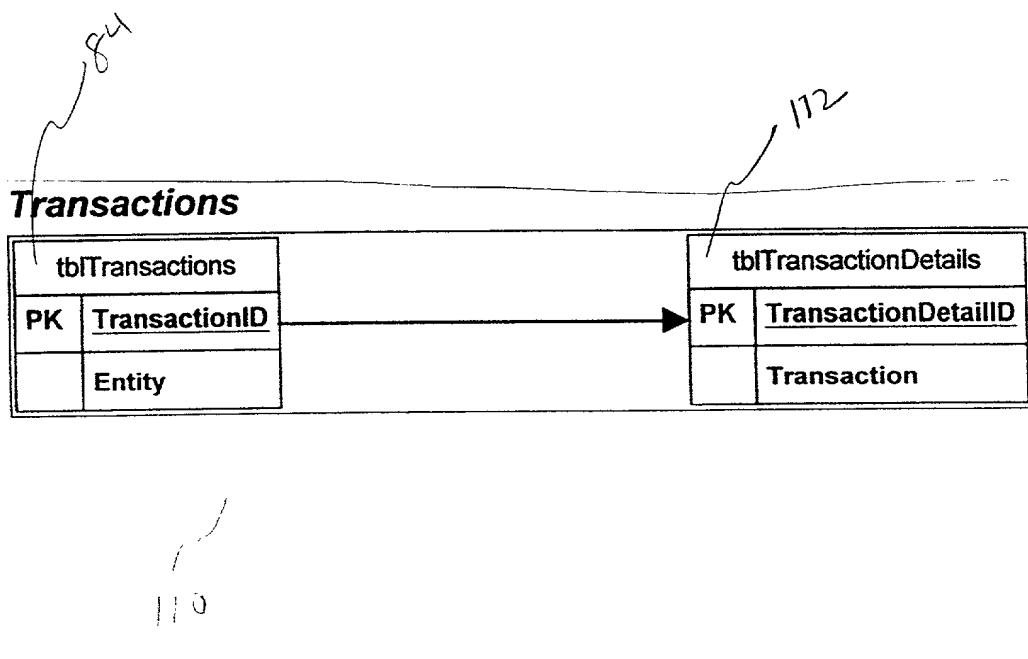


FIGURE 7

**Lists**

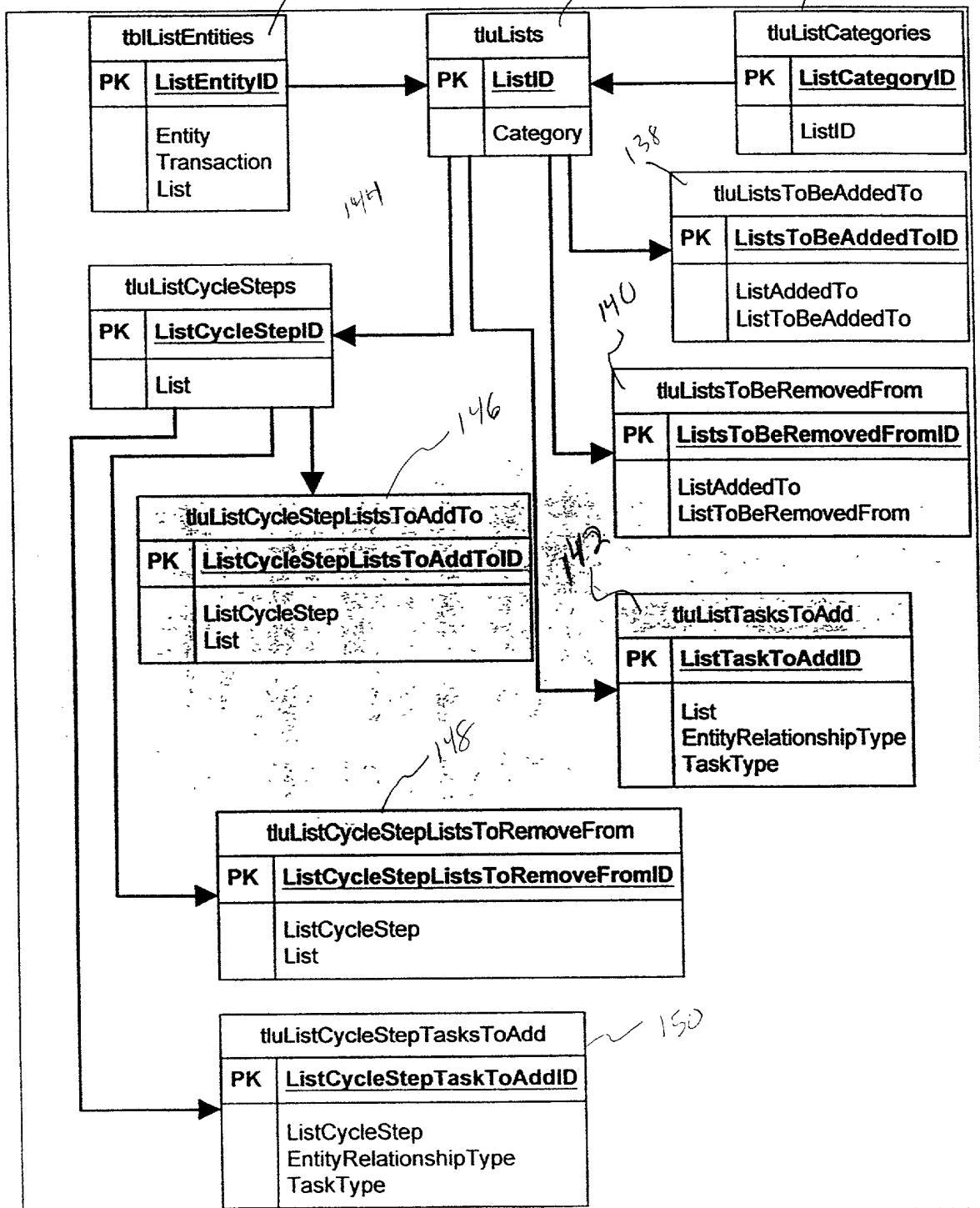


FIGURE 8

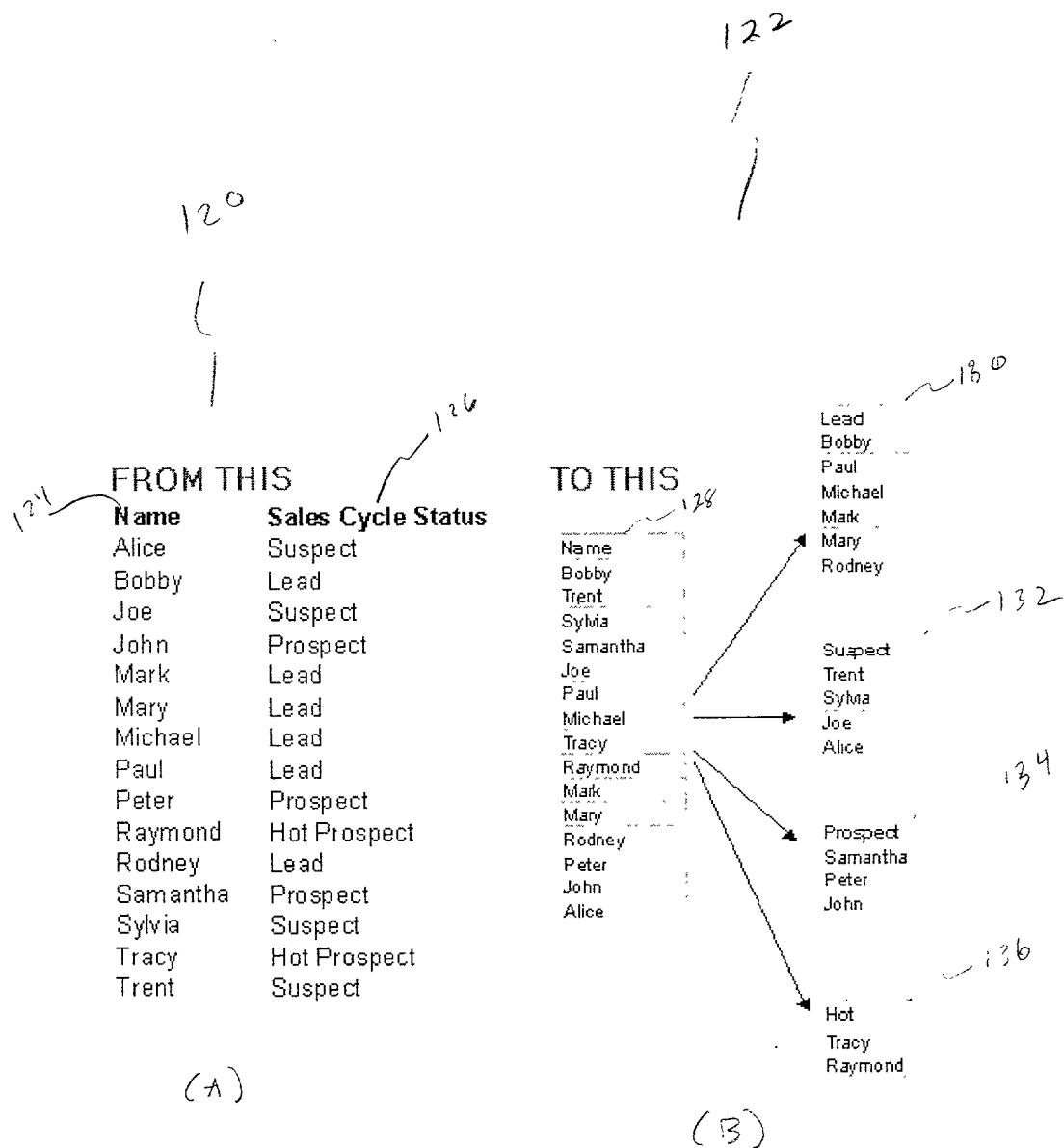


FIGURE 9

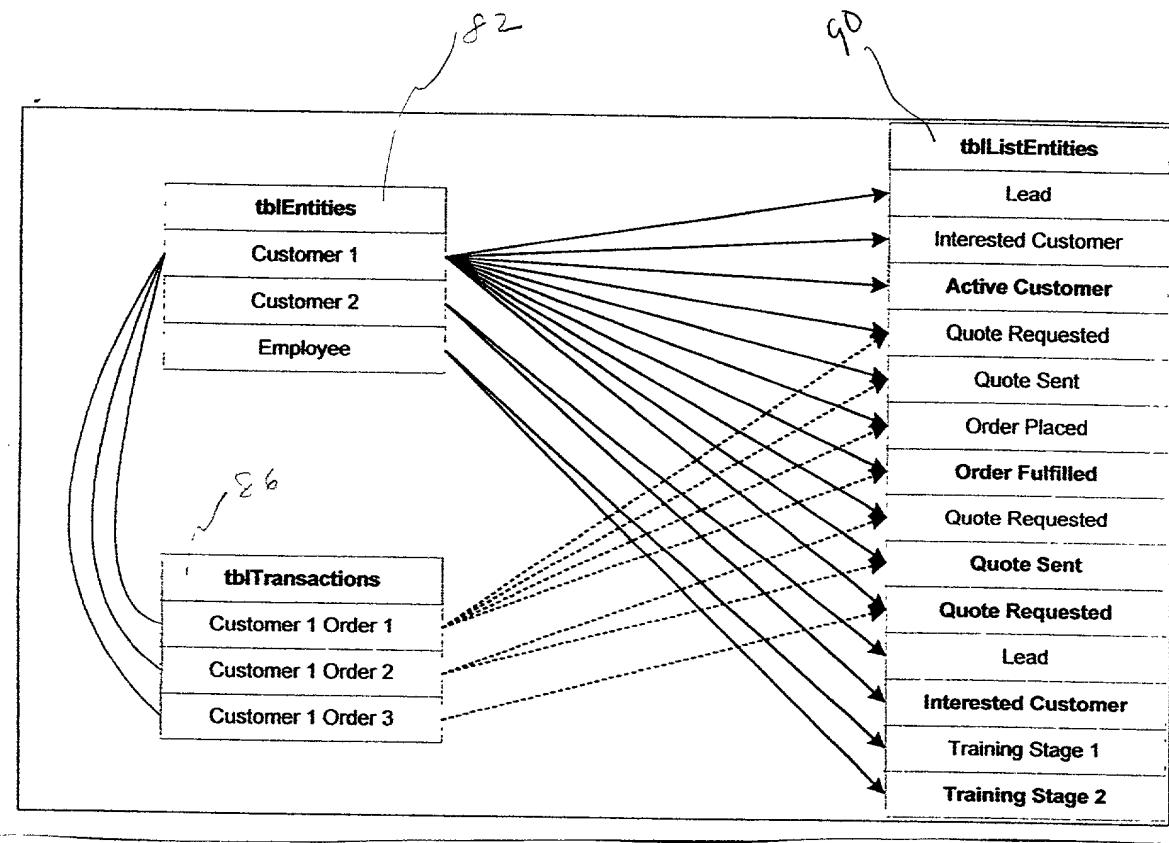


FIGURE 10

**Each List can, in turn, trigger other list additions, deletions or actions  
immediately or after a  
user-definable amount of time -  
creating a easily specifiable and  
virtually limitless eProcess chain  
reaction.**

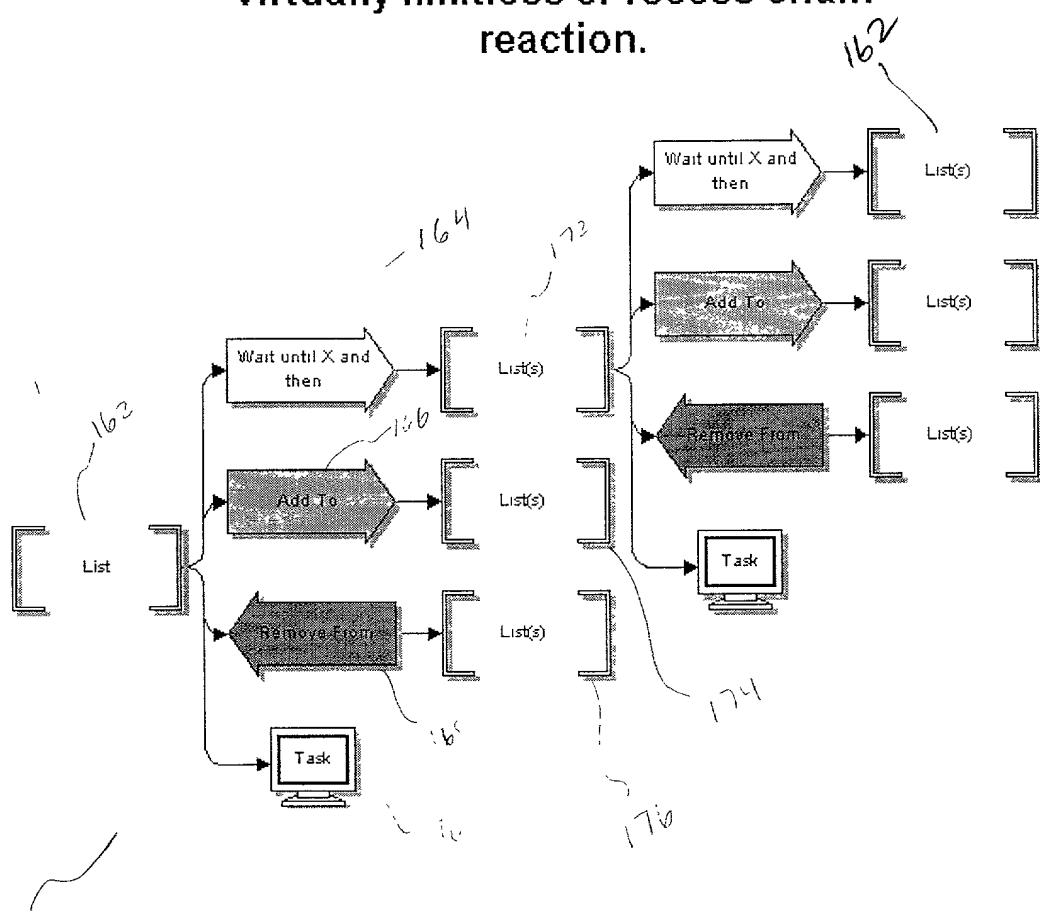


FIGURE 11

## Lists Sequences

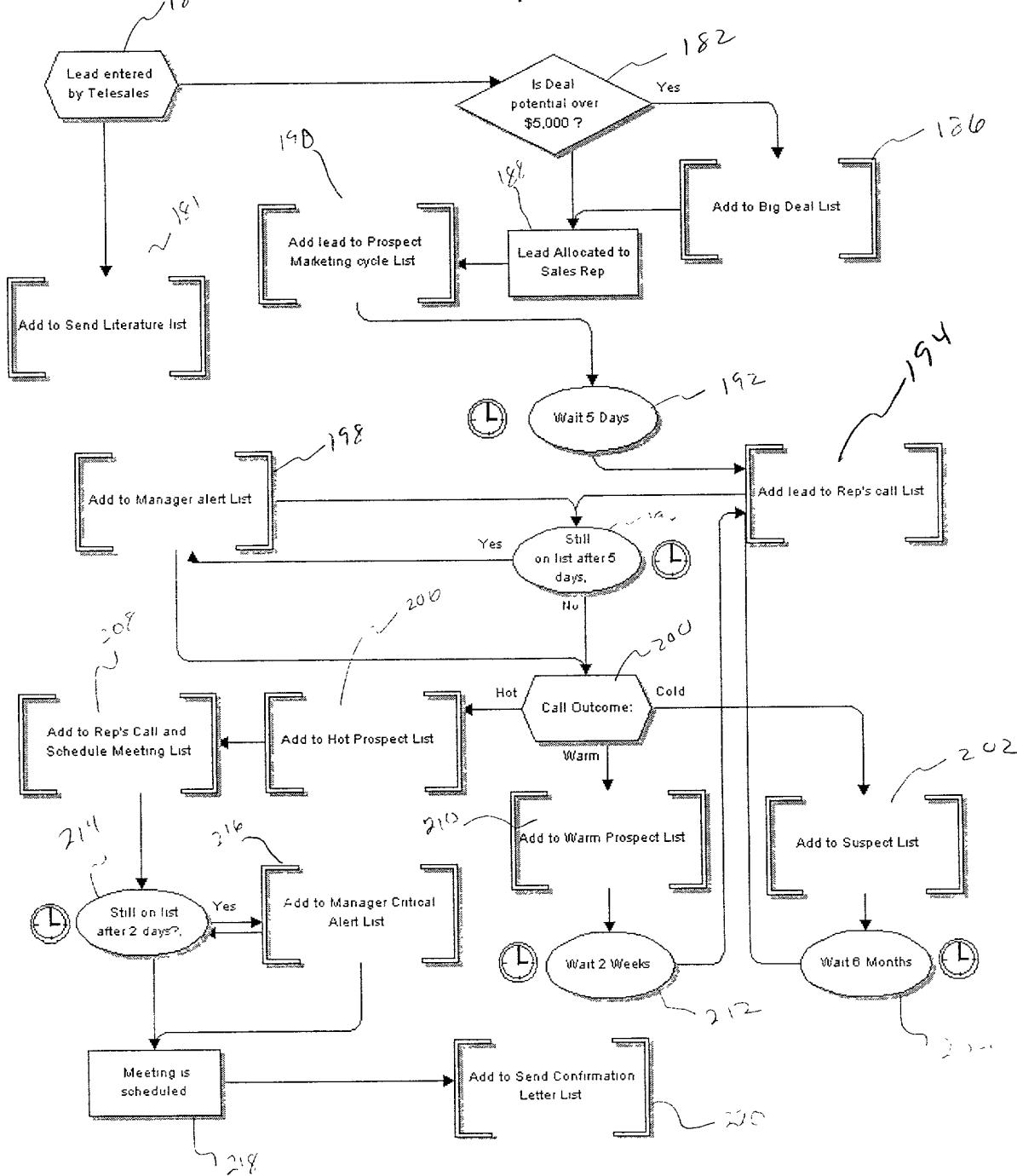
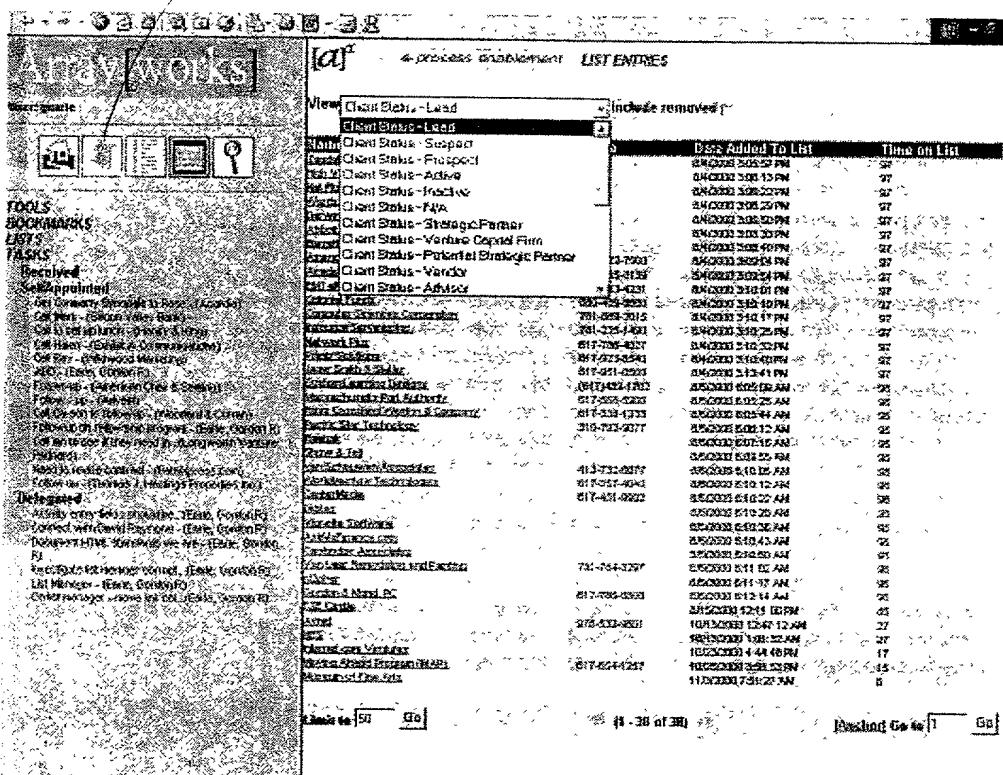


FIGURE 12

276



22

## FIGURE 13

Process Definition	Client Acquisition
Process	✓ 230
Description	Suspense Beam

Any process can be represented with steps and acceptable outcomes defined

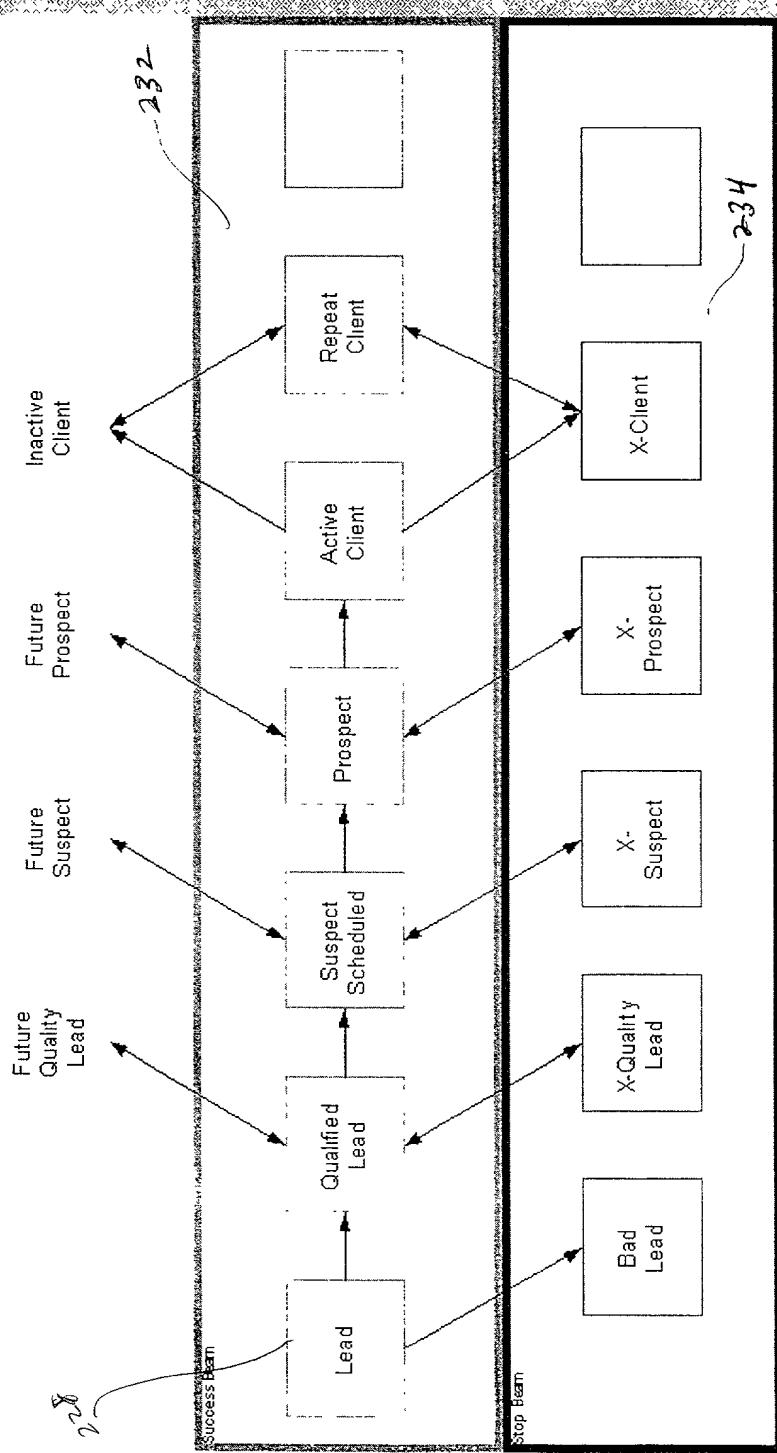


Figure 14

Lead \_\_\_\_\_

Behind each step is a List Rule Worksheet

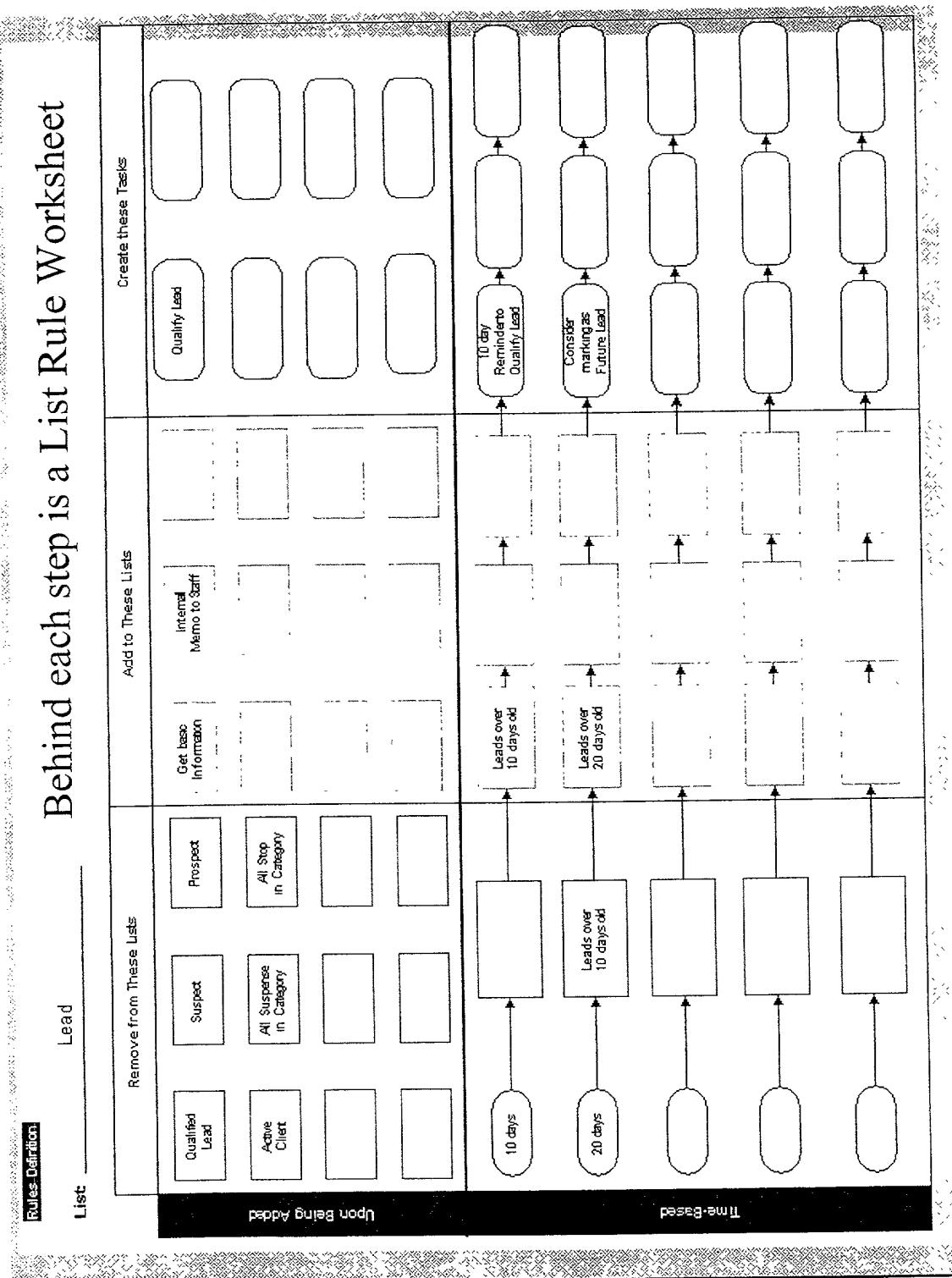


FIGURE 15

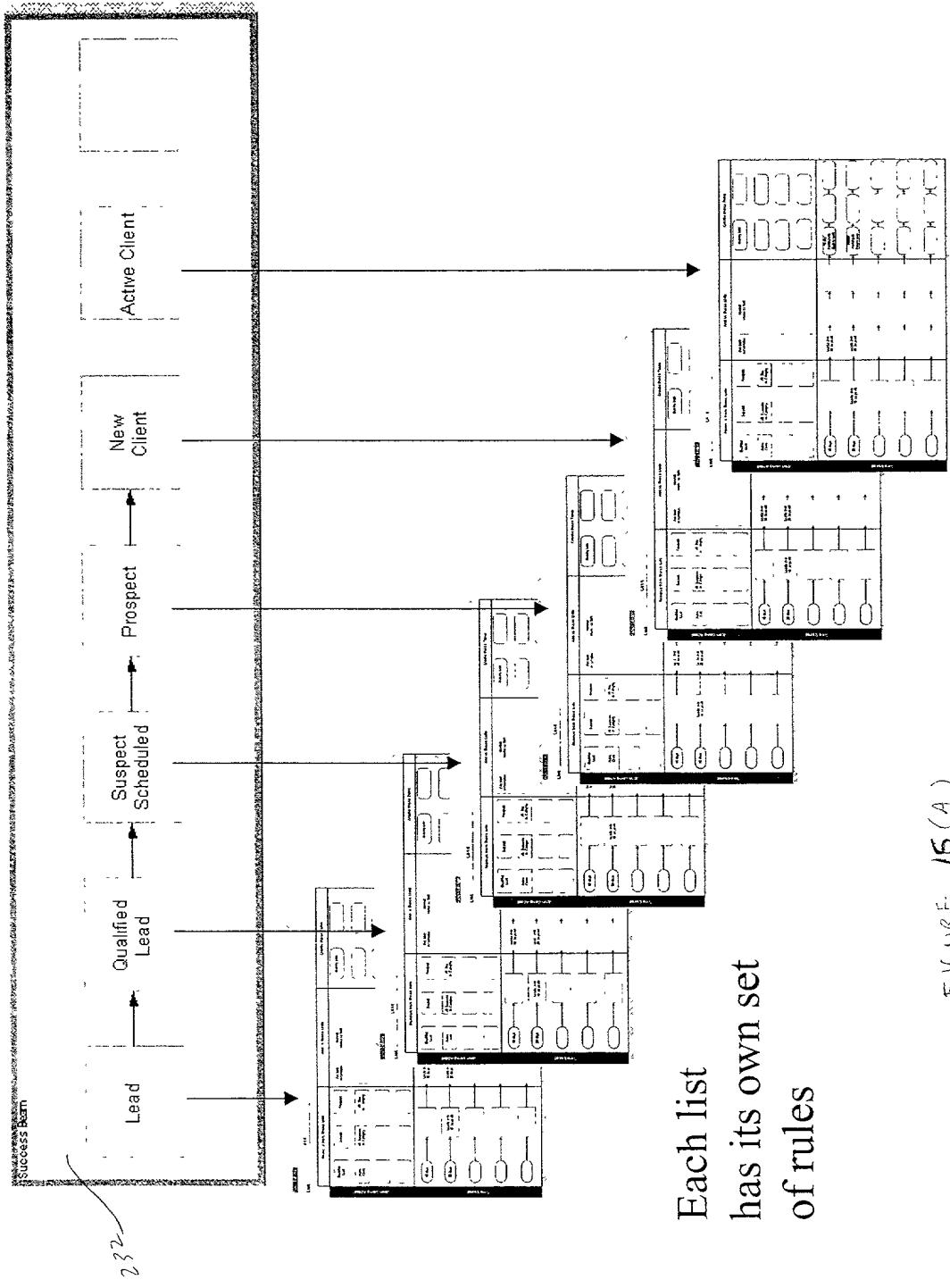
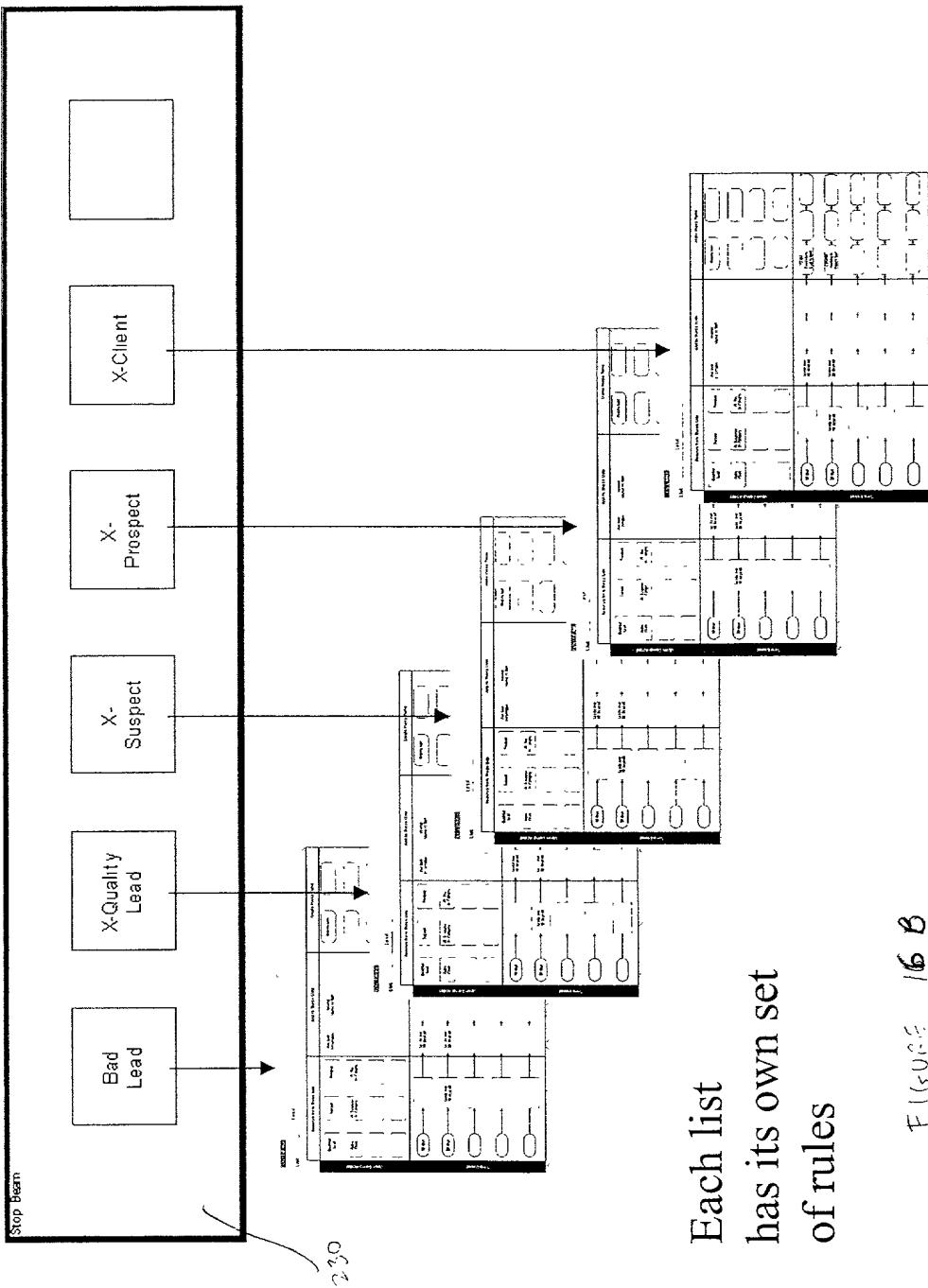


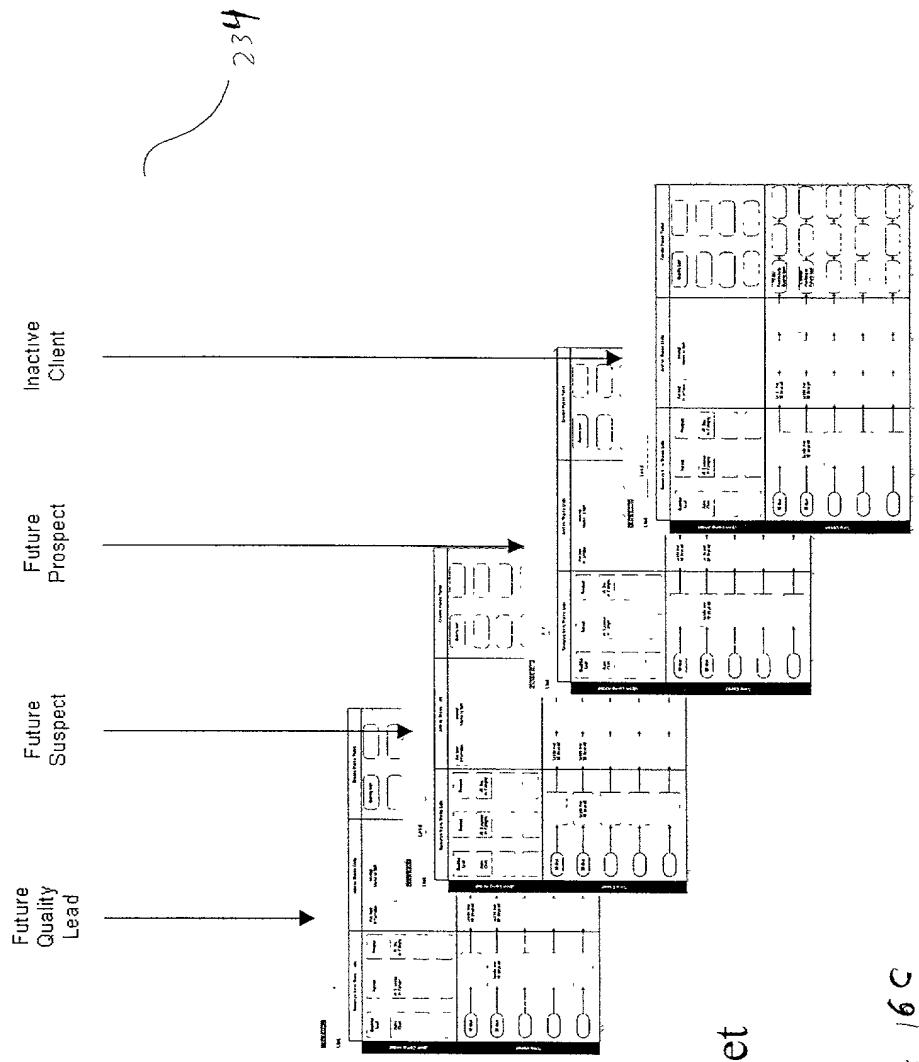
FIGURE 16(A)



Each list  
has its own set  
of rules

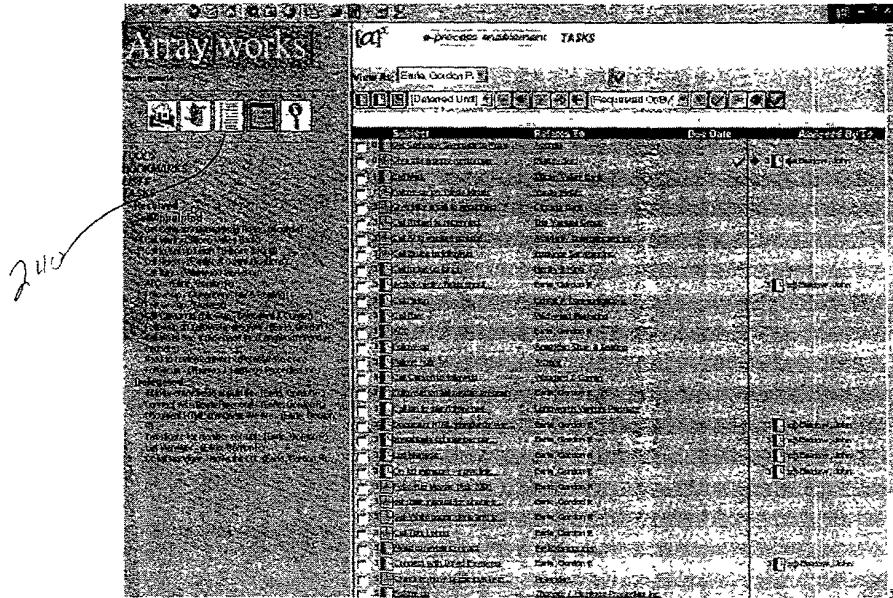
F16C / 6B

Suspense item

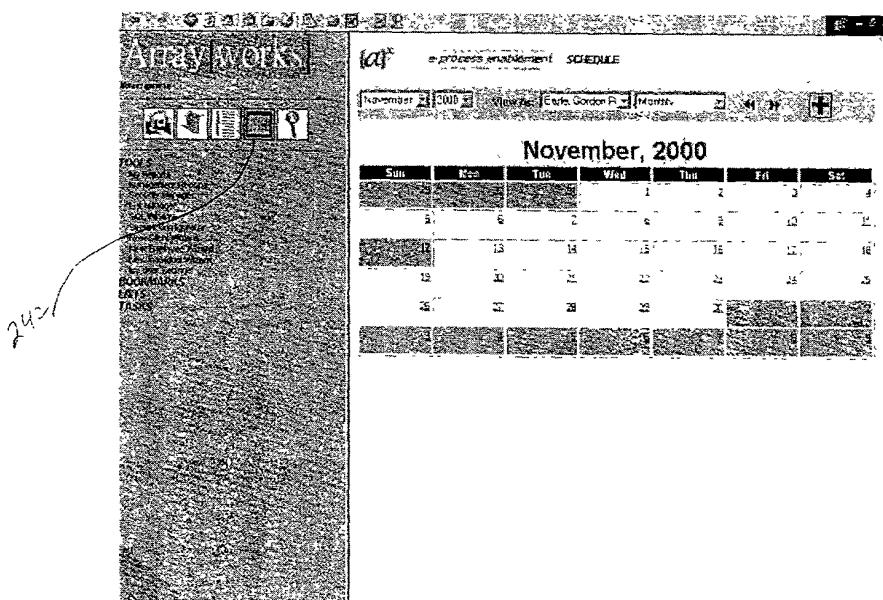


Each list  
has its own set  
of rules

FIGURE 16C



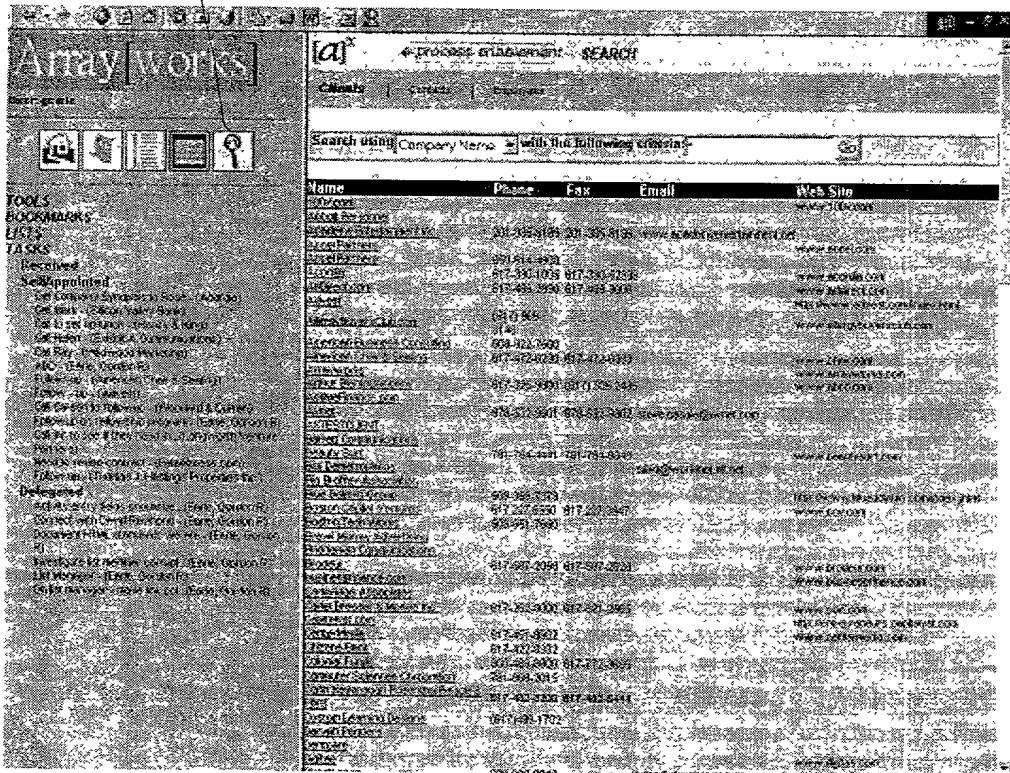
(A)



(B)

Figure 17

244



(c)

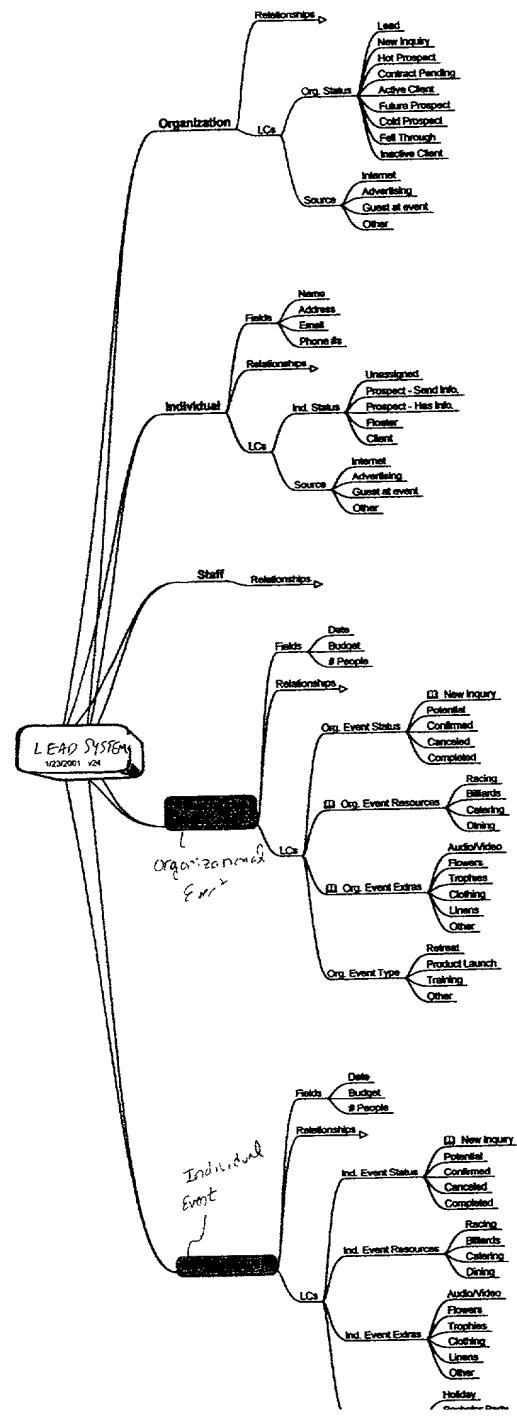


Figure 18

**View As:** Long, Chris

[Requested Of/By] [checkboxes]

Subject	Relates To	Due Date	Assigned By/To	
2 [No Subject]	<u>Cardinal Distributors</u>	✓	2 [ ] ➡ Quest, Karen	
3 [ ] Follow-up call	<u>Lolica Mobile Networks</u>	-		
3 [ ] Payment follow-up	<u>Corcoran Management</u>	-		
3 [ ] follow-up	<u>Don Law</u>	-		
3 [ ] Summer outing	<u>ICL Imaging</u>	-		
3 [ ] June 13	<u>Nixon Peabody</u>	-		
3 [ ] Aug meeting	<u>Reyes, Carlos</u>	-		
3 [ ] follow up	<u>Tweeter</u>	-		
3 [ ] Please follow up to mailing	<u>Firm Affairs Inc</u>	✓	◆ 3 [ ] ← Quest, Karen	
3 [ ] Please follow up to mailing	<u>Abington Savings Bank</u>	✓	◆ 3 [ ] ← Quest, Karen	
3 [ ] Please follow up to mailing	<u>Reyes, Carlos</u>	✓	◆ 3 [ ] ← Quest, Karen	
3 [ ] Ceridian 4-16-01	<u>Ceridian</u>	-		
3 [ ] follow up	<u>Firm Affairs Inc</u>	-		
3 [ ] Follow-up	<u>Abington Savings Bank</u>	-		
3 [ ] [No Subject]	<u>Printex</u>	-		
3 [ ] [No Subject]	<u>WAN Architects</u>	-		
3 [ ] incoming fax	<u>Corcoran Management</u>	-		
3 [ ] [No Subject]	<u>Tweeter</u>	-		
3 [ ] follow up	<u>Roberts Animal Hospital</u>	-		
◆ 3 [ ] Please call	<u>Auspice Inc</u>	-	3 [ ] ← Quest, Karen	
<b>Select All</b>		(1 - 20 of 22) ►	Limit to <input type="text" value="20"/> Go	
Update [Delegate To...]	Set Priority To:	Defer For:	or until	or undefeer

FIGURE 19A



**ON      OFF**

		Active (on by default)
		Active – deferred until time has expired (on by default)
		Deferred until future date/time (off by default)
		Show items that have been read (on by default)
		Show items that haven't been read (on by default)
		Show Self-appointed items (on by default)
		Show Delegated items (on by default)
		Show Received items (on by default)
		Show open items (on by default)
		Show items Marked-for-sign-off (on by default)
		Show items Signed-off (off by default)
		Show items that have been read by Requested Of/By (on by default)
		Show items that haven't been read by Requested Of/By (on by default)

FIGURE 19B



Create task and link it to current page



Create another item (type of item depends on which page icon appears)



Convert current page to printable format



Save current changes



Download current entity information to Microsoft Outlook



Create an activity record and associate it to current page/entry



If view is anchored, then move to previous item



If view is anchored, then move to next item

FIGURE 19C

**[a] e-process enablement TASKS**

**View As:** Long, Chris

[Requested Of/By]

Subject	Relates To	Due Date	Assigned By/To
2 [No Subject]	<u>Cardinal Distributors</u>	✓	2 [ ] ⇒ Quest, Karen
3 [ ] June 13	<u>Nixon Peabody</u>	-	-
3 [ ] Please follow up to mailing	<u>Firm Affairs Inc</u>	✓	◆ 3 [ ] ← Quest, Karen
3 [ ] Please follow up to mailing	<u>Abington Savings Bank</u>	✓	◆ 3 [ ] ← Quest, Karen
3 [ ] Please follow up to mailing	<u>Reyes, Carlos</u>	✓	◆ 3 [ ] ← Quest, Karen
3 [ ] [No Subject]	<u>Printex</u>	-	-
3 [ ] [No Subject]	<u>iWAN Architects</u>	-	-
◆ 3 [ ] Please call	<u>Ausdice Inc</u>	-	3 [ ] ← Quest, Karen
◆ 3 [ ] Please call	<u>Proctor &amp; Gamble</u>	-	3 [ ] ← Quest, Karen
◆ 3 [ ] Please follow up to mailing	<u>Rei-Mar Salon &amp; Spa</u>	-	3 [ ] ← Quest, Karen

Select All      (1 - 10 of 10)      Limit to 20      Go

Update  [Delegate To .]       Set Priority  To:       Defer For:  or until  or undefer

FIGURE 20

**Assigned To:** Piasecki, Richard **By** Quast, Karen

**Priority:** 3 **(Assigned To Priority - 3)**

**Description:** 25 - 100 people Date undetermined

**Due Date:**

[Goto Page]

#### **Interested Parties**

#### **Comments and Actions**

Date	By	Comment
03/01/01 04:34 PM	Piasecki, Richard	The task was marked for sign-off on 3/1/2001 4:34:25 PM
03/01/01 04:34 PM	Piasecki, Richard	End of the month over, sales meeting on monday will call
02/26/01 07:40 PM	Quast, Karen	The task was reactivated on 2/26/2001 7:40:11 PM
02/26/01 04:14 PM	Piasecki, Richard	The task was marked for sign-off on 2/26/2001 4:14:13 PM
02/26/01 04:14 PM	Piasecki, Richard	Site visit (?) with Pete Cronin Thurs PM
02/14/01 01:24 PM	Quast, Karen	Please give me status on this RJ wants to follow this mailing
02/14/01 01:24 PM	Quast, Karen	The task was reactivated on 2/14/2001 1.24.04 PM
02/14/01 01:00 PM	Piasecki, Richard	The task was marked for sign-off on 2/14/2001 1:00:25 PM
02/14/01 01:00 PM	Piasecki, Richard	Invited him in for a SV this week, Fri no confirmation yet
02/14/01 11:39 AM	Quast, Karen	is site visit scheduled?
02/14/01 11:39 AM	Quast, Karen	The task was reactivated on 2/14/2001 11:39:12 AM
02/14/01 09:33 AM	Piasecki, Richard	may come in for a site visit 2-16
02/09/01 10:42 AM	Piasecki, Richard	The task was marked for sign-off on 2/9/2001 10:42:04 AM
02/09/01 10:42 AM	Piasecki, Richard	Great Lead from mailer, will come in for site visit, incentive event in MAR
02/06/01 10:29 PM	Quast, Karen	The task was delegated

**Comment:**

Add Comment

#### **Subdelegated Tasks**

P	SOS	IRR	IIRT	Subject	Relates To	Assigned To	Due Date

FIGURE 21

**[a]<sup>x</sup>** e-process enablement **TASK**

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**Subject:** Sample Task

**Relates To:** Earle, Gordon

**Delegate To:** [Delegate To...]

**Priority:** 3

**Description:**   
 [Large text area]

**Due Date:** [Text input field]

**Defer:** For [Defer For...] or until [Text input field]

**Private:**

[Sign Off]

**Interested Parties**

**Comments and Actions**

Date	By	Comment
Comment:		<input type="button" value="Add Comment"/>

**Subdelegated Tasks**

P	SOS	URB	URT	Subject	Relates To	Assigned To	Due Date
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FIGURE 27